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APPLIED SCIENCE AND TECHNOLOGY

Saskatchewan Economic and Labour Market Overview 1999

Prepared by:
Advanced Business Consulting Ltd.
under the direction of
SIAST Planning, Research and Development

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Executive Summary

The "Saskatchewan Economic and Labour Market Overview" is prepared annually to provide a common basis for the "Regional Employment and Training Needs Assessment (RETNA)" reports.

- Saskatchewan's economy grew by 2.5% in 1998 and is projected to grow at an annual rate of 2.8% in 1999.
- Food processing continues to be one of the fastest growing industries in the province.
- The percentage of the population in their income earning years in Saskatchewan is relatively low.
- Saskatchewan has a far smaller percentage of total population that is a visible minority than do the other prairie provinces.
- The Aboriginal population will be a major source of labour force growth in Saskatchewan, and there will be pressure to provide educational opportunities for them.
- In the four Western provinces, Saskatchewan has the lowest percentage of it's labour force that has a university degree.
- In January 1998, Saskatchewan's unemployment rate for young people in the 15-24 age group was 11.2%, compared to 5% for those over 25.
- High growth areas for industries in Saskatchewan are sales and service, occupations in primary industry, trades, transportation and equipment operators, management and business, finance and administration.
- By the year 2000 the need for Technicians and Technologists will grow from 25% to 35% of the workforce.
- Saskatchewan has 92% of firms with under 20 employees, creating 46% of the jobs in the province.
- Most new occupations were found in areas which are in some way related to technology and which could be classified as the "knowledge" industry.

*****

Economic and Labour Market Overview 1999

1.0 Introduction

This report was completed for the Saskatchewan Institute of Applied Science and Technology (SIAST).

The report's objective is to monitor the influences and trends that impact on emerging training needs. In other words, to look at the larger picture and to present an external scan of the economic, demographic and labour market trends.

2.0 International Outlook

Projections for 1999 from The Conference Board of Canada include:

- The G-7 economies should turn in real GDP growth averaging 1.3% in 1999.
- A rapid deceleration in the U.S. economy, due in part to the international financial crises, will pull growth down to 1.7% next year.
- The Japanese economy will recover briefly for two quarters as the effects of fiscal spending packages kick in, but will slip back into stagnation for another year of negative growth in 1999.
- France and Germany will experience slower growth next year as domestic demand begins to tail off and the external sector continues to deteriorate.
- The beleaguered U.K. manufacturing sector is pulling down the overall economy, but a recession should be avoided next year.
- The real GDP growth of 2.4% in Canada next year will be well above the average for the G-7 economies. No recession is expected despite the recent collapse in confidence.
- A full-fledged international financial crises threatens the world economy.

(Source: The Conference Board of Canada. World Outlook: Global Economic Trends and Prospects, Autumn 1998)

3.0 Canadian Economy

- In the third quarter of 1998, real Gross Domestic Product (GDP) grew at an annual rate of 1.8%, a second consecutive quarter of moderate growth following seven quarters of robust growth averaging 3.7%.
- Foreign demand, especially from the United States, was the primary impetus for growth in the third quarter, boosting real exports and Canadian production.
- Domestic demand for Canadian products is weakening, and real imports of goods and services also declined.
- Robust employment growth continued with a rise of 103,000 jobs in November of 1998. The unemployment rate of 8.0% in November was the lowest level in over 8 years.
- Inflation in Canada is subdued, while pre-tax corporate profits rose by 4.5%. Gains were most noticeable in the high technology sectors of electronic equipment, computers and telecommunication carriers.
- In December of 1998, the Canadian dollar remained relatively stable at around 65 cents U.S., after closing at an all time low of 63.31 cents U.S. on August 27.

(Source: Department of Finance, The Economy in Brief, December 1998.)

3.1 Employment

- In December 1998, Canada's total employment was 14,430,000, which was up 1.1% from December 1997.
- In December 1998, the national unemployment rate was 7.7%.

(Source: Statistics Canada, Labour Force Characteristics Age 15 and Over http://www.statcan.ca/econoind/lfsuna.htm.)

3.2 Job Stability

The average duration of a job is 3.7 years. Significant trends include:

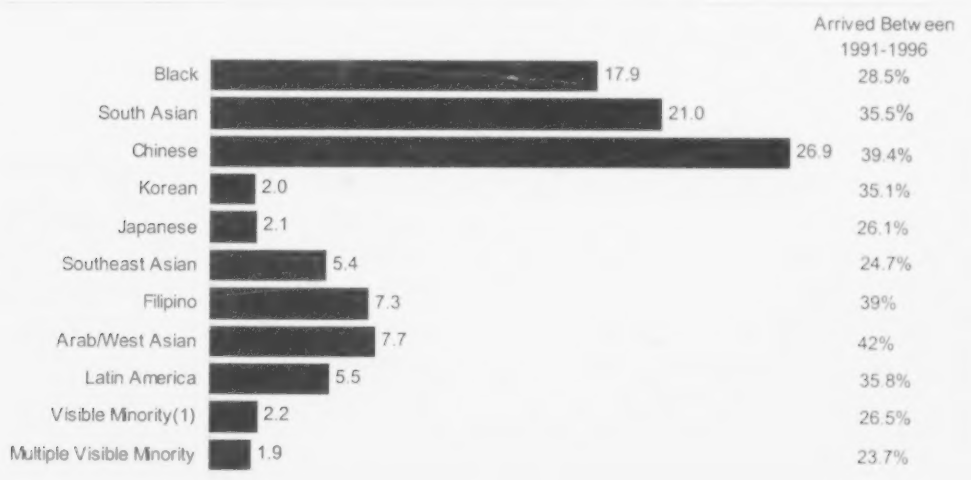
- An increase in short term jobs.
- Workers with more than 1 year of seniority are enjoying increasing stability, while at the same time the ranks of stable job holders is becoming more difficult to join.
- Workers in the community services industry enjoy average job lengths which are twice that of those in the business and personal services industry.
- Workers with some post-secondary education have average job lengths almost twice that of those without.
- Older workers have shorter average job lengths than younger workers; and fewer older job starters pass the 6 month tenure milestone.
- Females have jobs which are, on average, slightly longer than males.

(Source: Andrew Heisz, Changes in Job Tenure and Job Stability in Canada, November 1996.)

3.3 Visible Minorities

The Chinese and South Asian peoples led the way in visible minority immigration. Between 1991 and 1996, 39.4% of Chinese immigrants and 21% of South Asians arrived in Canada.

FIGURE 1: VISIBLE MINORITY GROUPS AS A PERCENTAGE OF CANADIAN IMMIGRANT POPULATION



(Source: Statistics Canada, Visible Minority Population, 1996 Census.)

For further details on immigration of new Canadians and visible minorities in the Western Canadian provinces, refer to Section 5.3, Table 5 and Figure 4.

4.0 Saskatchewan Economic Overview

The province of Saskatchewan is centrally located in Canada.

Saskatchewan's economy grew by 2.5% in 1998 and is projected to grow at an annual rate of 2.8% in 1999. Farm income continued to drop and retail sales were stagnant for the first half of 1998.

(Source: Conference Board of Canada, Provincial Outlook, Autumn 1998).

Key indicators for Saskatchewan include:

- Saskatchewan's GDP (inflation adjusted) grew from $27.961 billion in 1996 to $28.389 billion in 1997, an increase of $.428 billion or 1.5%.
- Employment averaged 478,000 in 1998, 4,442 more than the average for 1997. There were 7,100 more full time jobs in 1998 than in 1997.
- The Conference Board of Canada is forecasting continued strong employment growth, with a further 13,000 new jobs expected to be created over the next two years.
- Saskatchewan's economic growth is forecast to continue for at least the next five years.
- Saskatchewan's Partnership for Growth economic strategy targets annual growth of 2.5% in the GDP, and annual job growth of 4,000, through the end of the year 2000.

(Source: Government of Saskatchewan, Bureau of Statistics, Economic Review 1998, No. 52.
Government of Saskatchewan, Investing in People - Building on the Momentum, Budget Address, March 1998.
http:www.gov.sk.ca/econdev/locating/econover.shtml).

4.1 Economic Statistics

- Average annual employment in Saskatchewan in 1998 reached 478,600, up 4,400 over 1997. The all-time high exceeded the previous high average employment of 474,200 in 1997.
- Saskatchewan has the third lowest unemployment rate in the country. The unemployment rate for December 1998 was 6.0%, well below the national average of 7.7%.
- Regina is tied for the third lowest unemployment rate of major Canadian cities, at 5.5% in December 1998.
- Saskatchewan's population has increased steadily since 1992, reaching 1,027,900 in October 1, 1998 - the highest level since July 1988.

- Saskatchewan's oil industry continued to perform well despite lower prices in 1998. Production in the first nine months of the year increased 2% over the same time period in 1997.

- Potash continued to lead the way in mineral production, which is ahead of last year's pace by 8.6% in the first ten months of 1998.

- Food processing continued to be one of the fastest growing industries in the province, with shipments up 5.2% in the first ten months of the year compared to the same time period in 1997.

- After reaching the highest level in a decade in 1997, housing starts for the first eleven months of 1998 were 12.7% ahead of last year's pace

(Source: http://www.gov.sk.ca/econdev/whatsnew/econstats.shtml)

4.2 Government Spending

TABLE 1: SASKATCHEWAN GOVERNMENT SPENDING 1998-99.

	Millions of Dollars	Per Cent of Total
General Transfers to Third Parties		
District Health Services	$1,115.0	21.3
Medical Health Services and Support	419.7	8.0
Schools	396.0	7.6
Post-Secondary Education and Skills Training	321.6	6.2
Municipalities	80.2	1.5
RCMP Services	64.1	1.2
Agricultural Support	51.9	1.0
Economic Development and Jobs	44.7	0.9
Family and Youth Services	21.4	0.4
Gaming Funds	16.5	0.3
Other	23.1	0.4
	$2,554.2	48.8%
Transfers to Individuals		
Income Support, Housing and Other Assistance	$368.1	7.0
Agricultural Support	132.4	2.5
Prescription Drug Plan	64.0	1.2
Student Aid and Training	62.1	1.2
Family and Youth Services	41.8	0.8
Community Living	35.8	0.7
Treaty Land Entitlements	22.9	0.4
Other	12.9	0.3
	$740.0	14.1%

	Millions of Dollars	Per Cent of Total
Salaries and Operating		
Courts, Jails and the Justice System	$125.1	2.4
Highway Maintenance and Operations	114.6	2.2
Income Support and Assistance	110.3	2.1
Health and Education Administration	106.8	2.0
Parks, Forests and Natural Resources	96.7	1.9
Internal Government Departments	68.2	1.3
Agriculture and Economic Development	46.3	0.9
Other	38.4	0.7
	$706.4	13.5%
Pensions and Benefits		
Public Service	$150.3	2.9
Teachers	127.9	2.4
	$278.2	5.3%
Capital		
Construction of Transportation Systems	$103.5	2.0
Post-Secondary and Schools	46.9	0.9
Health	44.9	0.9
Municipalities	8.9	0.2
Infrastructure Programs	7.2	0.1
Other	18.2	0.3
	$229.6	4.4%
Interest on the Public Debt	$725.0	13.9%
Total Expense	**$5,223.4**	**100%**

(Source: Government of Saskatchewan. Investing in People - Building on the Momentum, Budget Address, March 1998.)

4.3 Significant Trends in Saskatchewan

1. Rural Depopulation.
2. Growing Aboriginal Population.
3. Stagnant Population Growth.
4. Aging Population.
5. Movement to Bedroom Communities.
6. No Immigration to Saskatchewan.
7. Decline of Traditional Family Structures.

(Source: Making Sense of the Census Seminar, March 1998, Statistics Canada)

5.0 Saskatchewan Demographics

As of October 1998, the Saskatchewan population stood at 1,027,900 people compared to 1,023,500 people in October 1997, an increase of 4,400.

TABLE 2: SASKATCHEWAN POPULATION, COMPONENTS OF GROWTH

		Annual and Monthly Totals/Averages			
Population and Migration		1995	1996	1997	1998 (Sept.)
Interprovincial Migration	Into Saskatchewan	21,947	22,240	20,302	7,827
	Out of Saskatchewan	24,620	22,647	23,093	7,029
	Net Flow	-2,673	-407	-2,791	798
Net International Migration		901	829	675	65
Natural Growth	Births	13,499	13,300	12,815	3,185
	Deaths	8,495	8,765	8,250	2,105
	Net Natural Growth	5,004	4,535	4,565	1,080
Population at end of period (000)		1,016.3	1,021.3	1,023.5	1,027.9

(Source: Sask Trends Monitor, Volume XV, Number 12, December 1998.)

It is believed that the inter-provincial migrants are mostly composed of young adults and that this inter-provincial migration is a major source of the loss of highly educated people. A comparison of the four Western Provinces shows that Saskatchewan has the highest net out-migration between the period 1988 to 1997.

5.1 Urban/Rural Split

According to the 1996 Census, 63.3% of Saskatchewan people live in urban centres[1] and 36.7% live in rural areas. Compared to Alberta and Manitoba, however, Saskatchewan still has a larger percentage of it's people living in rural areas. Alberta's urban/rural split is 74/26 and Manitoba's is 67/33.

Growth areas occurred in cities, Indian reserves and the north, while declines in population occurred in towns, villages, and RMs. (See Table 3). A 1% growth in overall population occurred.

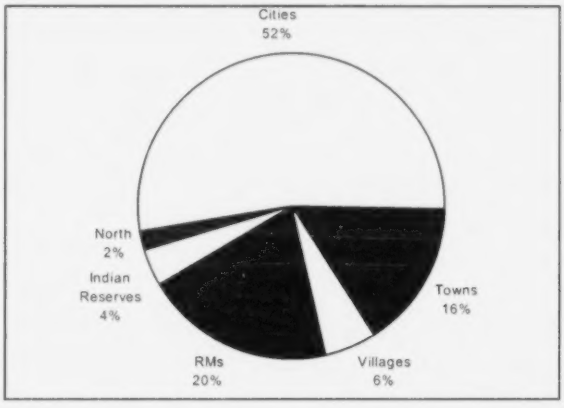
[1] Urban is defined as an area having a population concentration of 1,000 or more and population density of 400 or more per
square kilometer.

TABLE 3: POPULATION BY COMMUNITY TYPE, 1991 AND 1996 (EXCLUDING CENSUS UNDER-COVERAGE AND NON-PERMANENT RESIDENTS)

	1991	1996	Change
Cities	515,528	524,697	1.8%
Towns	156,699	154,585	(1.3%)
Villages	58,625	56,072	(4.4%)
RMs	209,661	197,131	(6.0%)
Indian Reserves	30,779	38,358	24.6%
North[2]	17,636	19,394	10%
Total	988,928	990,237	.1%

(Source: Statistics Canada 1996 Census)

FIGURE 2: URBAN/RURAL SPLIT



(Source: Statistics Canada 1996 Census)

According to the 1996 Census, Saskatoon is the largest city in Saskatchewan and the seventeenth largest in Canada; Regina is the eighteenth largest in Canada. In the period between 1991 and 1996, Saskatoon grew 3.8% and Regina grew 1%. According to the 1996 Census, the five largest cities in Saskatchewan had the following populations. The Census data is compared to Department of Health data as of June 30, 1996 and 1998.

TABLE 4: POPULATION BY URBAN CENTRE

City	Census 1996	Health Insurance Registration 1996	Health Insurance Registration 1998
Saskatoon	193,647	192,940	205,992
Regina	180,400	179,584	187,085
Moose Jaw	32,973	34,115	34,505
Prince Albert	34,777	33,755	39,356
Yorkton	15,154	15,699	16,783

(Source: Statistics Canada 1996 Census)

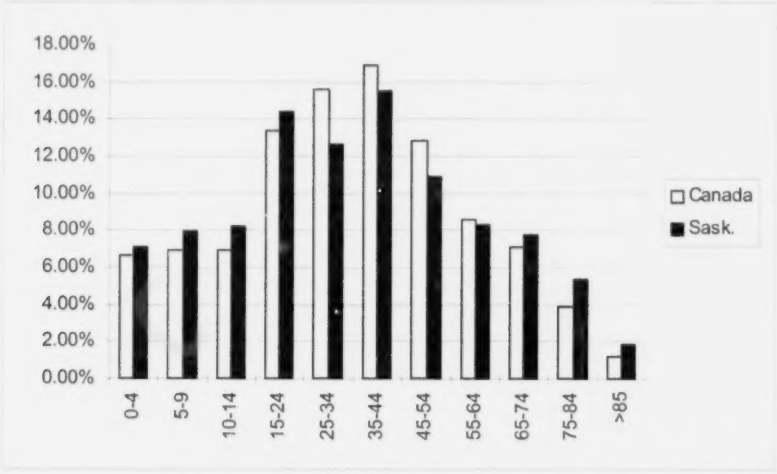
[2] The term North refers to those residents of the far North not otherwise classified.

The remaining cities all have fewer than 15,000 inhabitants.

5.2 Age Distribution and Dependency Ratio

In comparison to the rest of Canada, a large proportion of Saskatchewan's population in 1996 was under the age of 19 and over the age of 60. This means that the percentage of the population in their income earning years is relatively low compared to the dependent age groups.

FIGURE 3: SASKATCHEWAN AGE DISTRIBUTION COMPARED TO CANADIAN AGE DISTRIBUTION

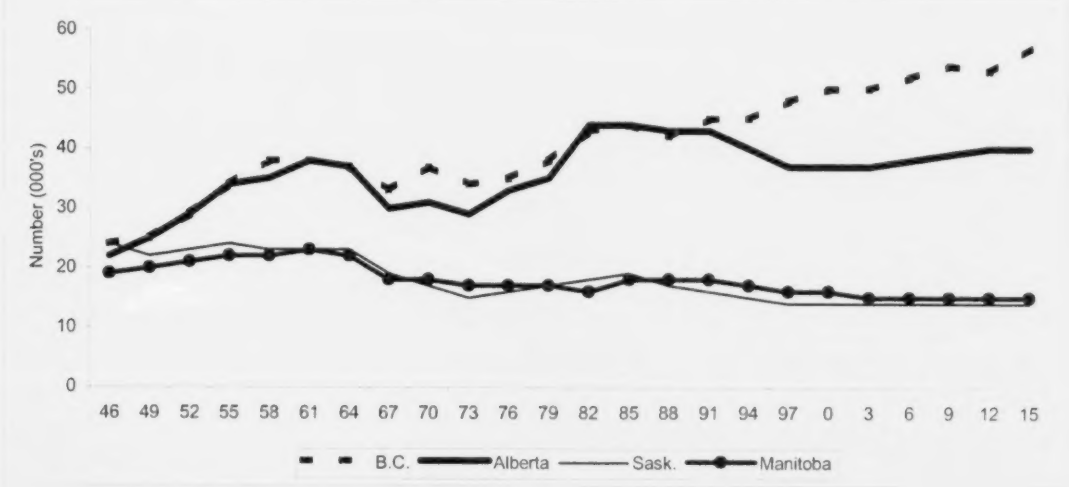


(Source: Statistics Canada, Population by Five-Year Age Groups, 1996 Census.)

In Saskatchewan and Manitoba, the effect of the Baby Boom and Baby Boom Echo (1980- 1995) is much less pronounced than in Alberta and British Columbia

.

FIGURE 4: NUMBER OF BIRTHS IN WESTERN PROVINCES 1946-2016



5.3 Immigration of New Canadians

TABLE 5: IMMIGRATION OF NEW CANADIANS TO SASKATCHEWAN

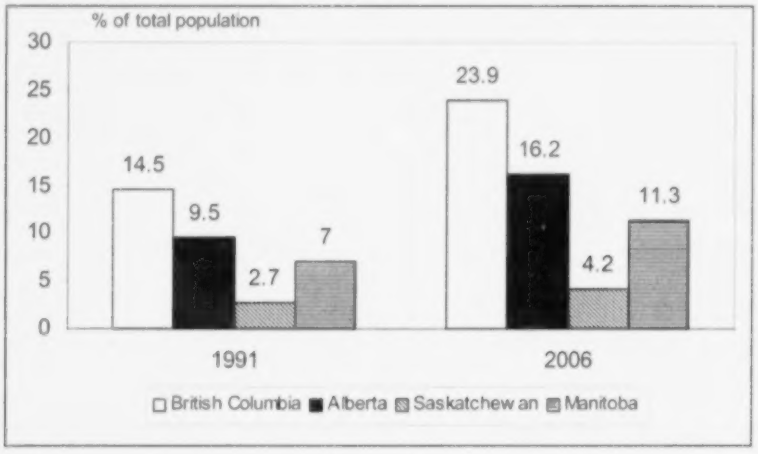
	1995	1996	1997	1998	% change from last year
First quarter	494	432	427	345	-19.2%
Second quarter	517	489	445	373	-16.2%
Third quarter	421	575	464	483	4.1%
Fourth quarter	495	377	n/a	425	n/a
Total	**1,927**	**1,873**	**1,336**	**1,761**	

(Source: Government of Saskatchewan, Bureau of Statistics. Monthly Statistical Review. Volume 25, Number 1, January 1999.)

The province of Saskatchewan consists of approximately 3.4% of the Canadian population, but receives less than 1% of the total immigrants to Canada.

Figure 5 illustrates visible minorities across Western Canada and illustrates that Saskatchewan has a far smaller percentage of total population that is a visible minority than do the other Prairie provinces.

FIGURE 5: VISIBLE MINORITIES BY WESTERN CANADIAN PROVINCE[3]



[3] *Source: Roger Sauve, Statistics Canada and People Patterns Consulting, Western Canadian Trends Work Book – Regina Seminar, Trends and Forecasts, Shaping the Present and Future of Western Canada, p.7.*

6.0 Aboriginal Population

For the purposes of this report, the following definitions will be used:

- **Aboriginal** - people who are descendants of the original peoples of the land. In Canada, Aboriginal includes the Indian, Métis and the Inuit.
- **Inuit** - people who live in the arctic and sub-arctic of Canada.
- **Métis** - persons who are of mixed Aboriginal and non-Aboriginal ancestry; have ancestors who were entitled to receive land grants and/or scripts under the provisions of the Manitoba Act #18780 or the Dominion Lands Acts; or can show proof they are Métis.
- **First Nations People** - Indian people of Saskatchewan who are legally designated as Status, Registered or Treaty, under the Indian Act.
- **Non-Status Indian** - persons of Aboriginal ancestry who do not qualify for status under the provision of the Indian Act. They posses no special rights and privileges by virtue of their Aboriginal ancestry.

(Source: SIAST Education Equity Program Annual Monitoring Report, 1997.)

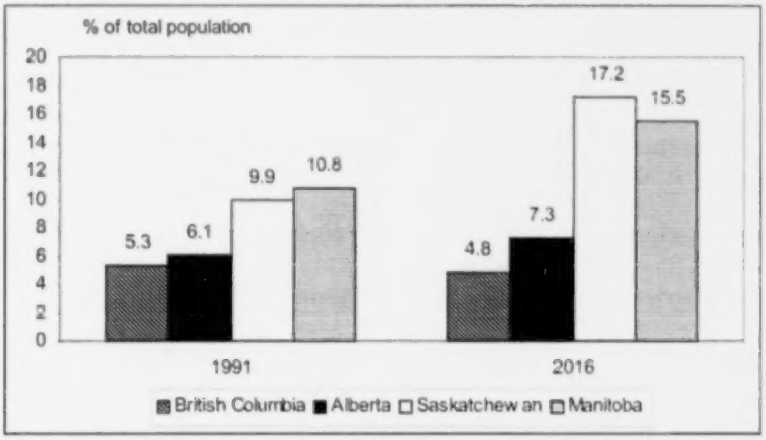
About 63% of all Aboriginal people live in the four Western provinces, compared with 30% of all Canadians, although there are varying degrees of measurement of the Aboriginal population in Saskatchewan. These different estimates include:

- The Department of Indian Affairs (INAC) estimated a population of 94,947 "Registered" Indians as of December 1996 who are members of Saskatchewan First Nations.
- Saskatchewan Health reports that of August, 1997, there were 83,403 Registered Indians.
- Statistics Canada reports that in 1991 there were 96,580 persons with at least some Aboriginal ancestry.
- A recent study commissioned by the Federation of Saskatchewan Indian Nations (FSIN) estimated a figure of 116,908 based on the assumption that the Census missed a substantial portion of the Aboriginal people.

(Source: Federation of Saskatchewan Indian Nations. Saskatchewan and Aboriginal Peoples in the 21st Century: Social Economic and Political Changes and Challenges. 1997.)

Figure 6 illustrates the trend towards the importance of the Aboriginal population in the Western Provinces.

FIGURE 6: ABORIGINALS AS A PERCENTAGE OF TOTAL POPULATION



(Source: Statistics Canada. Projections of Populations with Aboriginal Ancestry)

The implications of the growth of the Aboriginal population as a percentage of total population are that they will be a major source of labour force growth in Saskatchewan, and that there will be pressure to provide educational opportunities for them.

6.1 Age Composition of Aboriginal Population

In general, the Aboriginal population is significantly younger than that of the Canadian population. This is illustrated below:

TABLE 6: POPULATION COMPARING ABORIGINAL AGE GROUPS TO TOTAL CANADIAN POPULATION

	Under 15	15-24	25-44	45 Years and over	Total Population
Total Population	20.7%	13.5%	32.7%	33.1%	100%
Aboriginal Population	35.1%	18.0%	30.5%	16.4%	2.8%

(Source: Statistics Canada, 1996 Census of Canada.)

6.2 Aboriginal Women

Table 7 illustrates that there is a large percentage of Aboriginal women in the population of the prairie provinces.

TABLE 7: ABORIGINAL WOMEN AS A PERCENTAGE OF PROVINCIAL POPULATION OF WOMEN

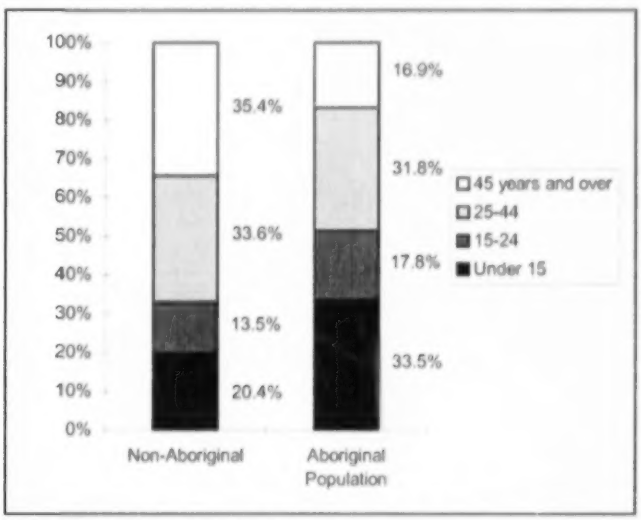
	Total Population	Total Women	Aboriginal Women	Abor. Women as % of Total Women	Aboriginal Women as % of Total Population
Manitoba	1,091,942	558,220	65,060	11.7%	5.9%
Saskatchewan	**988,928**	**492,810**	**56,775**	**11.5%**	**5.7%**
Alberta	2,545,553	1,332,655	63,145	4.7%	2.4%
B.C.	3,282,061	1,863,415	71,450	3.8%	2.2%

(Source: Statistics Canada, 1996 Census of Canada)

In all other provinces, Aboriginal women represented about 2% of the women. In Manitoba and Saskatchewan Aboriginal women make up a far larger percentage of the total population than in the other provinces.

In 1996, 33.5% of the female Aboriginal population was under 15 years of age, compared to 20.4% of the non-Aboriginal population. There are few differences between the age distribution of Aboriginal men and women.

FIGURE 7: AGE DISTRIBUTION OF ABORIGINAL WOMEN VERSUS CANADIAN WOMEN



(Source: Statistics Canada, 1996 Census of Canada)

6.3 Educational Level of Aboriginal People

In the Aboriginal community, 60.4% of the population aged 15 and over have not completed high school. Less than half of Aboriginal people aged 15 and over have any education after high school. Table 8 illustrates the education gap.

TABLE 8: THE ABORIGINAL EDUCATION GAP IN 1991 – POPULATION AGE 15 AND OVER

	Did Not Complete High School	Received High School Diploma	Some Education After High School Including Trade Certificates
Aboriginal People	60.4%	6.6%	41.7%
Non-Aboriginal People	44.5%	11.5%	55.3%
Education Gap	15.9%	-4.9%	-13.6%

(Source: Federation of Saskatchewan Indian Nations. Saskatchewan and Aboriginal Peoples in the 21st Century: Social Economic and Political Changes and Challenges. 1997.)

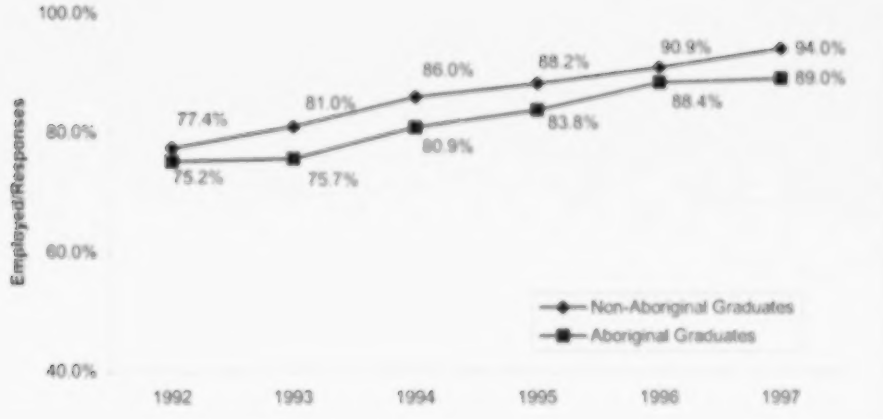
According to the 1991 Aboriginal Peoples Survey, 28% of Aboriginal adults were taking post-secondary education or training for a certificate, diploma or degree in 1990/91. There were 10.1% of Aboriginal adults pursuing upgrading in high school equivalency and another 17.9% reported that they had taken a training course of some sort.

6.4 Aboriginal Employment and the Training Link

Statistics Canada defines the Employment Rate as the Employed/Population Ratio. It also defines the Labour Force as those Employed and Unemployed, excluding those who are not looking for work (not in the Labour Force).

SIAST surveys it's graduates to track these rates. Figure 8 illustrates the Employment Rates of SIAST graduates from 1992 to 1997.

FIGURE 8: EMPLOYMENT RATES OF SIAST GRADUATES



(Source: Saskatchewan Institute of Applied Science and Technology, 1997 Aboriginal Employment Statistics Report, December 1998.)

The 1997 Labour Force Employment Rate for Aboriginal graduates is 89%. For Non-Aboriginal graduates, the Labour Force Employment Rate is 94%.

6.5 Aboriginal Income

The Aboriginal Impact Study estimates that the Aboriginal employment income in Saskatchewan in 1995 was $13,942, while employment income for non-Aboriginals was $20,526. The 1997 SIAST graduates as a whole averaged $1,850 per month or $22,200 per year. Aboriginal SIAST graduates averaged $1,779 per month or $21,348 per year.

The average earnings of Aboriginal women are lower than those of Aboriginal men as well as those of non-Aboriginal women, although the largest differences occur in male full time and part time incomes.

TABLE 9: COMPARISON OF SASKATCHEWAN EMPLOYMENT INCOME

Full Time	Aboriginal	Non-Aboriginal	Difference	Average
Male FT	$27,251	$31,518	-$4,267	$31,378
Male PT	$9,632	$15,108	-$5,476	$14,615
Female FT	$21,283	$22,028	-$745	$21,997
Female PT	$7,395	$9,630	-$2,235	$9,480

(Source: Federation of Saskatchewan Indian Nations. Saskatchewan and Aboriginal Peoples in the 21st Century: Social Economic and Political Changes and Challenges. 1997.)

Other sources of income for the Aboriginal population are shown in the following table.

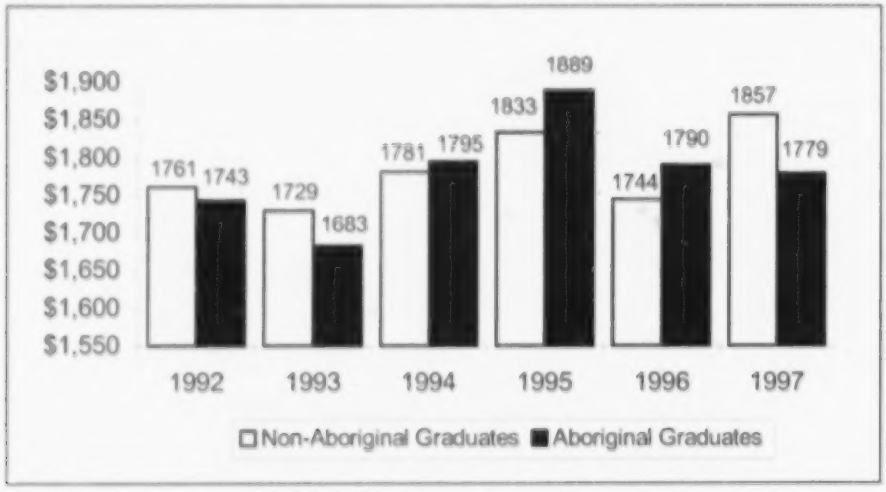
TABLE 10: SOURCES OF INCOME BY ABORIGINAL STATUS AND GENDER

Income Source	Aboriginal People		Non-Aboriginal	
	Men	Women	Men	Women
Pensions	1.7%	1.5%	10.2%	7.8%
Self-Employment	2.9%	1.5%	8.2%	4.5%
Investments	5.4%	4.9%	39.8%	39.2%
Wages and Salaries	55.5%	41.7%	64.2%	58.9%
Transfers and other sources	31.1%	28.2%	3.6%	5.0%

(Source: The Economic Status of Saskatchewan Women, Spring 1997.)

It has been shown that the average full time salaries for Aboriginal graduates, when employed in occupations related to the training they received SIAST is very comparable to the graduates overall. It has actually been higher than the salary for non-Aboriginals for a number of years. Figure 9 illustrates this.

FIGURE 9: AVERAGE MONTHLY FULL TIME TRAINING RELATED SALARY 1992-1996



(Source: Saskatchewan Institute of Applied Science and Technology, 1997 Aboriginal Employment Statistics Report, December 1998.)

6.6 Profile of the Métis Population

The Métis people are included in the statistics for the previous sections on the Aboriginal population. The Statistics Canada Aboriginal Peoples Survey included Métis, North American Indian and Inuit people. Further analysis is now available in the Statistics Canada report " A Profile of the Métis." According to this report, the following findings may be of interest.

- Overall, people who identified as Métis made up less than 1% of Canada's total population.
- In Manitoba and Saskatchewan, the Métis people identified by the survey accounted for 3% of the population, with 2% in Alberta and 7% in the Northwest Territories.
- The Métis people accounted for 22% of the Aboriginal people identified in the survey; with 37% in Alberta, 33% in Manitoba and 31% in Saskatchewan.
- Two-thirds of Métis lived in urban centres; 47% of Aboriginal people in Saskatoon are Métis, 46% in Edmonton and 43% in Winnipeg.
- Almost two-thirds of Canada's total Métis population live in the three Prairie provinces.
- The total number of Métis who identified themselves is 135,265.
- For Saskatchewan the total identified Métis population is 26,995, with Manitoba at 33,230 and Alberta at 38,755.

(Source: Statistics Canada 89-547-XPE. A Profile of the Métis, Target group project, September 1996.)

7.0 Labour Force

In December 1998, Saskatchewan's labour force participation rate at 65.9% was the fourth highest in Canada. The participation rate reflects the percentage of the total population over the age of 15 which are either employed or seeking employment. The labour force participation rate is reflected in Table 11.

TABLE 11: CANADIAN LABOUR FORCE PARTICIPATION RATE

Year	1994	1995	1996	1997	1998 (Dec)
Province					
Canada	**65.3**	**64.8**	**64.9**	**64.8**	**64.8**
Alberta	71.8	72.0	72.1	71.8	71.3
Manitoba	66.6	66.3	66.5	66.9	67.5
Ontario	66.5	65.7	66.0	65.9	66.2
Saskatchewan	**65.9**	**66.0**	**65.6**	**66.4**	**65.9**
P.E.I	65.4	65.6	66.2	66.3	64.1
British Columbia	66.7	65.7	65.5	64.9	64.1
Quebec	62.5	62.2	62.1	62.1	62.1
New Brunswick	59.1	59.3	59.0	60.1	60.6
Nova Scotia	60.4	59.8	59.9	60.2	59.2
Newfoundland	53.6	53.1	52.1	52.5	52.9

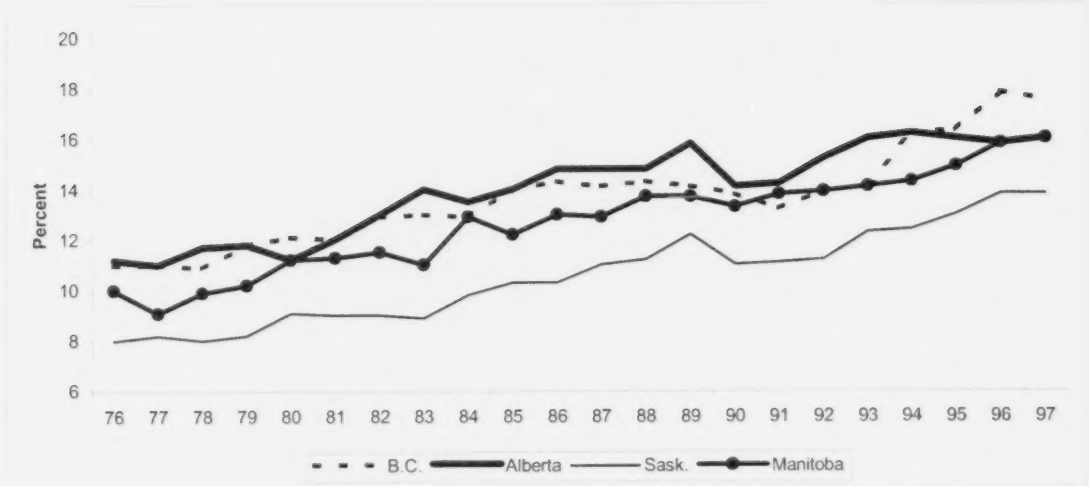
(Source: Statistics Canada, Labour Force Characteristics Age 15 and Over http://www.statcan.ca/econoind/lfsuna.htm.)

7.1 Educational Attainment of Labour Force

Saskatchewan has the lowest percentage of it's labour force with a university degree in the four Western provinces. This trend does not necessarily mean that Saskatchewan educates fewer people, but it is a result of the out-migration of university graduates.

More and more people are enrolling in post-secondary education and this will have an impact on the available pool of young people to enter the work force. Long distance education, particularly on-line education and just-in-time education will mean that employed people can continue with their education while still working.

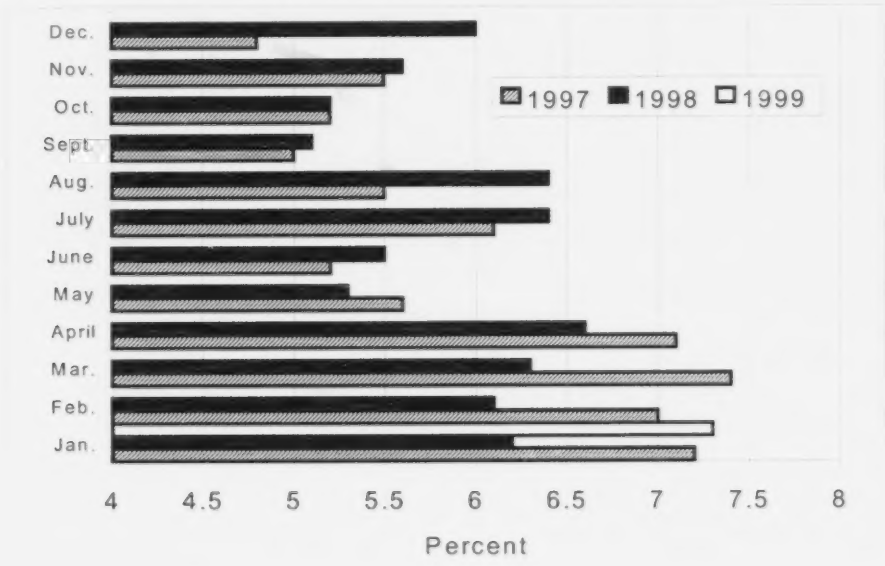
FIGURE 10: LABOUR FORCE WITH A UNIVERSITY DEGREE



(Source: Statistics Canada. Labour Force Survey.)

7.2 Unemployment Rates

FIGURE 11: MONTHLY UNEMPLOYMENT RATES FOR SASKATCHEWAN FOR 1997/1998/1999 (PER CENT)



(Source: Government of Saskatchewan, Monthly Statistical Review, Volume 25, No. 2, Feb. 1999.)

7.3 Employment Compared to Other Provinces

Employment in Saskatchewan grew by .4% during the period of December 1997 to December 1998, while employment grew in Canada by 3.2%. In comparison, Alberta employment grew by 3.4% and Manitoba recorded 2.1% employment growth in the same period.

(Source: Statistics Canada, Labour Force Characteristics Age 15 and Over http://www.statcan.ca/econoind/lfsuna.htm.)

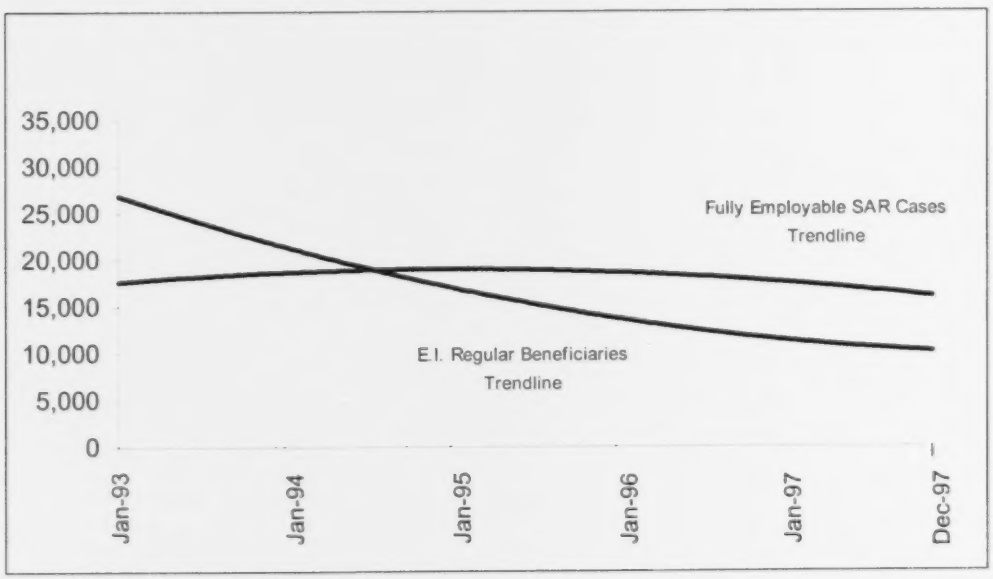
7.4 Social Assistance and Employment Insurance Recipients

Saskatchewan's average unemployment rate for 1997 (6.0%) is tied with Alberta for the lowest in the country. The actual rate in January 1998 was 5.5%, down from 7.2% in January 1997. In January 1998 Canada had a national unemployment rate of 9.2%.

(Source: Statistics Canada. Labour Force Employed and Unemployed, Numbers and Rates, January 1998.)

Figure 12 illustrates the trends in social assistance and employment insurance recipients.

FIGURE 12: SASKATCHEWAN SOCIAL ASSISTANCE RECIPIENTS[4] VERSUS EMPLOYMENT INSURANCE BENEFICIARIES - JAN. 93 TO DEC. 97



[4] Fully Employable SAR: person capable of working 36 hours per week or more including: employed full or part time; unemployed; and undergoing training.

As shown in Figure 12, the number of employment insurance beneficiaries has shown a decreasing trend since 1993. In December 1997, 11,713 individuals received employment insurance benefits compared to 13,556 in December 1996. These recipients received an average weekly payment of $286.46 in 1997 compared to $231.17 in 1996.

Fully employable social assistance recipients have shown a stable trend over the 1993 to 1997 period. In December 1997, 15,529 individuals received social assistance, compared to 17,685 in December 1996.

(Sources: Social Services, Quarterly Statistical report and HRDC Administrative Data.)

TABLE 12: FULLY EMPLOYABLE SAR CASES AND EMPLOYMENT INSURANCE BENEFICIARIES BY REGION

Region	SAR Cases	E.I. Beneficiaries
Saskatoon	4,801	3,106
Regina	5,974	2,066
Prince Albert	2,125	1,541
Moose Jaw	1,004	569
North Battleford	1,343	1,031
Melfort	590	1,188
Swift Current	287	558
Yorkton	959	688
Kindersley	103	195
Estevan	518	872
Humboldt	166	319

(Source: Regional Planning Area Comparisons by Selected Labour Market Variables, as supplied by SIAST).

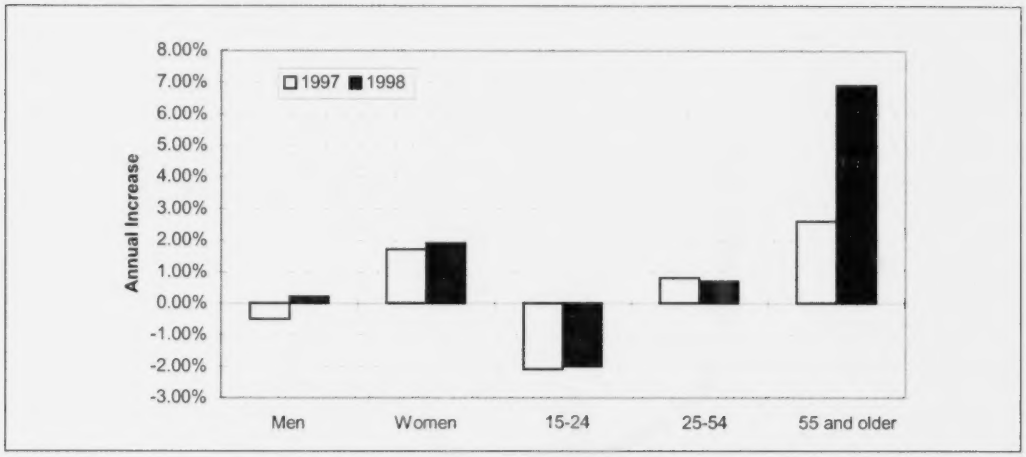
7.5 Employment by Gender

Employment among women increased an average of 1.9% in 1998. Employment among men increased .2% in the same time period. In November of 1998, 45.3% of jobs were held by women compared to 44.7% in December of 1997.

In Saskatchewan, unemployment rates are lower for females (4.1% in December of 1998 and 3.1% in December of 1997) than males (7.7% in December of 1998 and 5.8% in December of 1997).

(Source: Sask-Trends Monitor, Volume XV-Number 12, December 1998.)
(Source: Government of Saskatchewan, Bureau of Statistics. Monthly Statistical Review, Volume 25, No.1, January 1999.)

FIGURE 13: EMPLOYMENT GROWTH BY GENDER AND AGE GROUP



(Source: Sask-Trends Monitor, Volume XV-Number 12, December 1998.)

7.6 Youth Unemployment

1998 showed a continuing trend towards less employment among young people in Saskatchewan. Employment for those in the 15-19 age group shrank from 34,300 in December 1997 to 31,200 in December 1998. Employment in the 20-24 age group shrank from 45,300 to 44,800 in the same time period. In January 1998, Saskatchewan's unemployment rate for young people in the 15-24 age group was 11.2%, compared to 5% for those over 25.

(Source: Government of Saskatchewan, Bureau of Statistics. Monthly Statistical Review, Volume 25, No.1, January 1999.)

7.7 Employment Changes by Region

In December 1998, Regina and Saskatoon CMAs (the Census Metropolitan Areas include surrounding towns such as Lumsden and White City (Regina), Warman and Dundurn (Saskatoon)) account for 46% of the jobs in the province, even though they have only 35% of the population in the labour force age group (15 and older).

Up until December 1998, employment growth in Regina was 5.4% compared to 1.6% for Saskatoon. Also showing increases were the West Central region by 2.4% and the Swift Current/Moose Jaw Region which increased 1.9%. Employment decreases occurred in Prince Albert/Northern Saskatchewan (-1.6%), the Southeast (-2.4%), and the East Central region (-.7%)[5].

[5] *Regions indicated are Statistics Canada Economic Regions.*

7.8 Employment by Industry

TABLE 13: EMPLOYMENT BY INDUSTRY

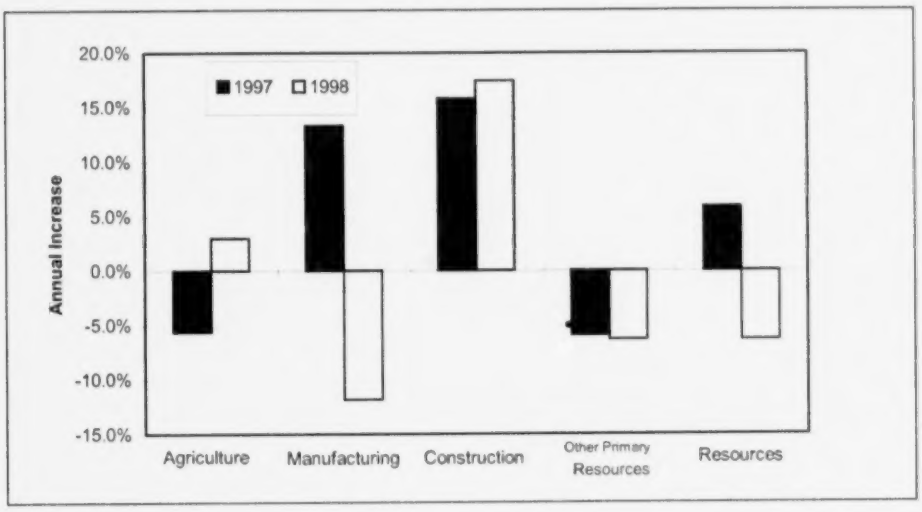
Industry	1992	1993	1994	1995	1996	1997	November 1998
	Thousands						
Agriculture	78	79	70	72	71	67	69
Manufacturing	26	26	28	31	30	34	31
Construction	19	18	19	21	19	23	27
Transportation, Communication, And Other Utilities	32	34	35	37	34	37	34
Trade	73	73	81	78	80	78	75
Finance, Insurance And Real Estate	24	25	24	25	21	26	24
Service	155	156	159	154	159	166	174
Public Administration	30	31	30	29	29	28	29
Other Primary Industries	13	12	11	14	17	16	15
All Industries	451	455	457	460	461	474	467

(Source: Government of Saskatchewan. Saskatchewan Labour Force Summary, March 1998.)

Industry shifts in 1998 over 1997 included an increase in construction (4,000), agriculture (2,000), and public sector employment (1,000). The largest increase occurred in the service industries (8,000). Decreases occurred in all other categories, with the largest decreases occurring in manufacturing, transportation and communication, and trade (-3,000 each). A decrease also occurred in the finance, insurance and real estate sector (-2,000 each).

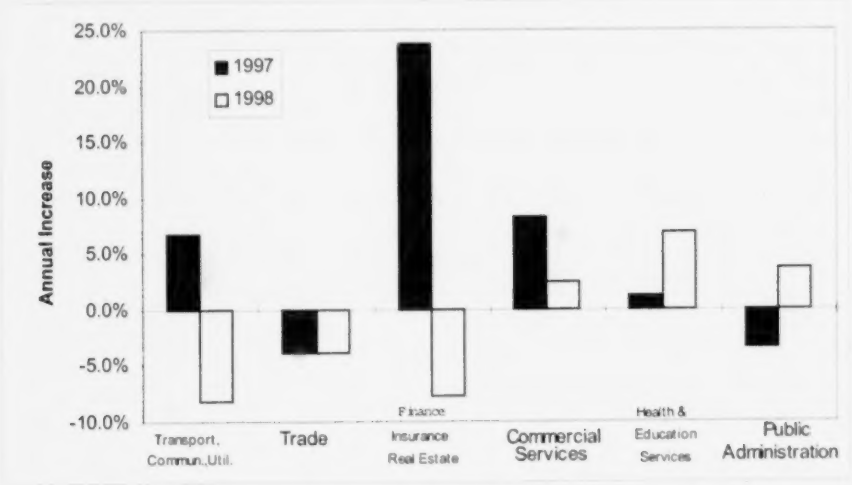
The changes in employment growth in Saskatchewan by industry type are depicted in Figures 14 and 15.

FIGURE 14: EMPLOYMENT GROWTH BY INDUSTRY TYPE, GOODS PRODUCING



(Source: Sask-Trends Monitor, Volume XV-Number 12, December 1998.)

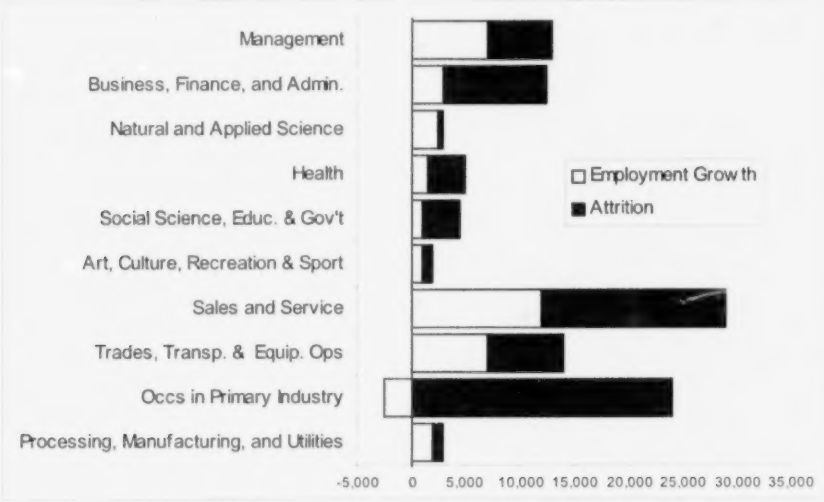
FIGURE 15: EMPLOYMENT GROWTH BY INDUSTRY GROUP, SERVICE PRODUCING



(Source: Sask-Trends Monitor, Volume XV-Number 12, December 1998.)

Figure 16 Illustrates employment growth and attrition requirements by industry grouping.

FIGURE 16: PROJECTED EMPLOYMENT GROWTH AND ATTRITION REQUIREMENTS BY OCCUPATIONAL GROUPS, SASK. 1997-2005

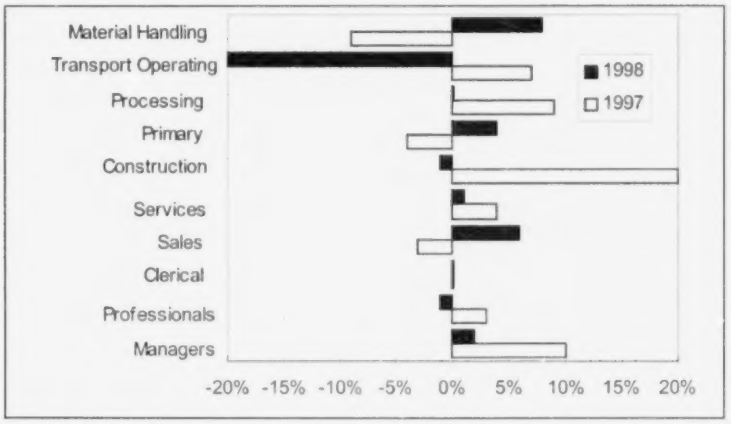


(Source: Strategic Initiatives, Labour Market Information Project, Forecast July 1997)

Figure 16 illustrates that the high growth areas for industries are sales and service, occupations in primary industry, trades, transportation and equipment operators, management and business, finance and administration.

7.9 Employment by Occupation

FIGURE 17: ANNUAL EMPLOYMENT GROWTH BY OCCUPATION GROUP



(Source: Sask-Trends Monitor, Volume XVI, Number 1, January 1999.)

The changes in occupations are consistent with the patterns in industry groups. There were substantial increases in construction, processing and transport operating occupations.

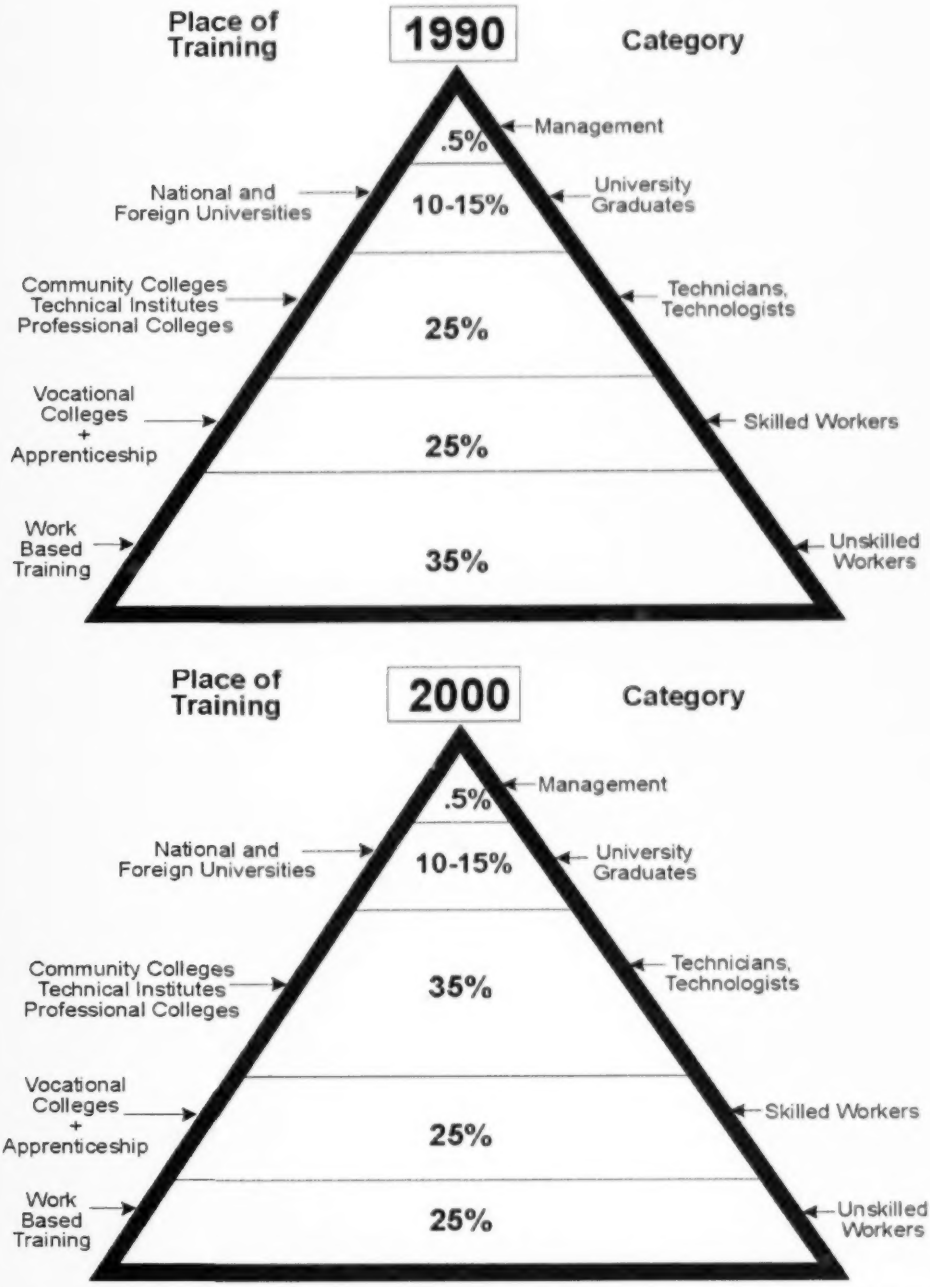
7.10 Future Outlook

Full time employment in Saskatchewan continues to rise due mainly to the diversity of the provincial economy. Statistics Canada figures show the average number of people working in the first 11 months of 1998 increased by 2.1% which is a change of .5% from November 1997.

7.11 Skill Requirements of the Workforce

There is growing proof that required skill levels in the Canadian work force are changing. Figure 18 illustrates the difference in required skill levels for the workforce in 1990 versus those that will be needed in the year 2000.

FIGURE 18: EVOLUTION OF REQUIRED SKILL LEVELS FROM 1990 TO 2000

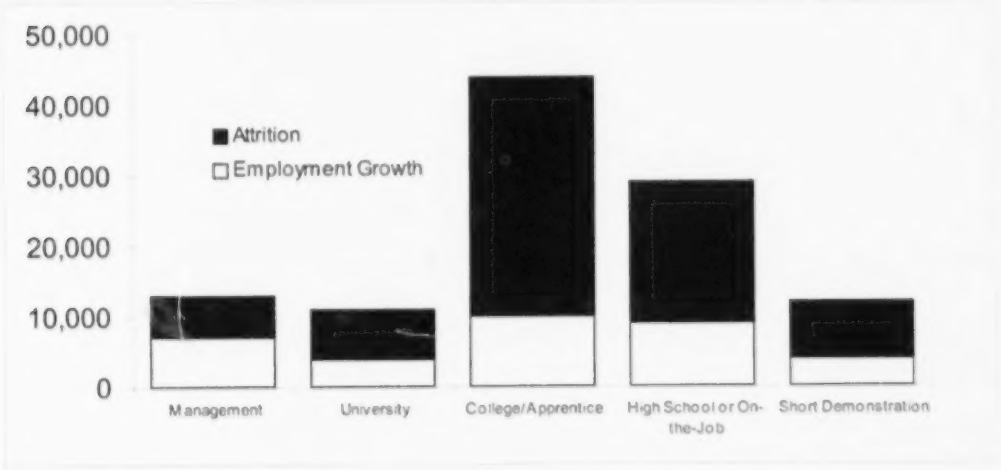


(Source: The Association of Community Colleges (ACCC), Developing Community Colleges as a Response to Economic and Social Change: The Canadian Experience, 1995.)

As Figure 18 illustrates, the need for Technicians and Technologists will grow from 25% to 35% of the workforce in the year 2000, while the need for Unskilled Workers is declining from the previous level of 35% to 25%. Vocational Colleges and Technical Institutes will be called upon to provide the necessary skills training for these growing categories.

Figure 19 illustrates the projected employment growth and attrition requirements by skill level for Saskatchewan and from where the education to fuel this growth will come.

FIGURE 19: PROJECTED EMPLOYMENT GROWTH AND ATTRITION REQUIREMENTS BY NOC[6] SKILL LEVEL, SASK. 1997 - 2005



(Source: Strategic Initiatives, Labour Market Information Project, Forecast July 1997)

[6] NOC: National Occupational Classifications.

8.0 Saskatchewan's High Growth Sectors

During the consultations for the Province of Saskatchewan's Partnership for Growth Strategy[7],stakeholders in six key economic sectors with strong growth potential helped the provincial government develop an inventory of opportunities. The stronger, more immediate opportunities are summarized as follows:

8.1 Agri-value

The agri-value sector includes: agriculture; agriculture services; fishing, hunting and trapping; agriculture and industrial chemicals; agriculture biotechnology; agriculture machinery; grain storage; and food processing.

8.1.1 Agri-value Trends

- continued growth in the production of grains, oilseeds and pulse crops
- continued expansion of the agricultural biotechnology sector
- further development of oilseed crushing, specialty crop processing and agri-food packaging
- expansion of hog production to two million hogs per year by 2000
- establishment of a large hog slaughter and processing facility
- increased finishing, slaughter and processing of cattle

8.1.2 Agri-Value Skill Shortages

The Identification of Saskatchewan Skilled Worker Shortage Project identified a number of agricultural areas that are suffering a skill shortage that cannot be filled immediately with Saskatchewan graduates.[8] These areas include:

- The agricultural and industrial chemicals; and agriculture biotechnology industries. A shortage in biology agronomists in this industry which requires skills in agriculture and computers.
- The hog production industry has a shortage in barn managers and requires experience in large-scale hog operations.
- The hog production industry has a shortage of managers of hog production. These jobs require experience in very large hog operations.

(Note: The sector study was conducted prior to the recent drop in hog prices, and the findings should be re-evaluated in the current context.)

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7 (Source: Saskatchewan Economic Development., Partnership for Growth - Building on the Renewal of The Saskatchewan Economy, February 1996.)

8 (Source: Saskatchewan Economic and Cooperative Development, Saskatchewan Post-Secondary Education and Skills Training, Human Resources Development Canada, and the Saskatchewan Institute of Applied Science and Technology, Identification of Saskatchewan Skilled Worker Shortage Project, January 1999.)

8.2 Forestry

8.2.1 Forestry Trends

Trends in the Forestry sector include the:

- pulp mill expansion in northwest Saskatchewan
- expansion of pulp and paper production in north-central Saskatchewan
- establishment of an oriented strand board plant in northeast Saskatchewan
- harvesting of burned timber
- further development of specialty forest products

8.2.2 Forestry Skill Shortages

All vacancies in this sector can be filled from within Saskatchewan.

8.3 Mining/Minerals

8.3.1 Mining/Mineral Trends

Trends in the Mining/Minerals Sector include the:

- completion of construction of two uranium mines
- development of three new uranium mines, pending environmental assessment
- development of two new gold mines
- development of one copper/zinc project
- continued diamond exploration

8.3.2 Mining/Minerals Skill Shortages

This sector is able to meet all of it's requirements from within Saskatchewan or Canada. The positions that would have to be filled outside Saskatchewan include:

- The potash industry. The jobs of accountant and mining engineers.
- The uranium industry. The jobs of mining engineers, metallurgist and radiation supervisor.

8.4 Energy

The Energy Sector Study includes utilities, crude petroleum and natural gas, refined oil and coal products, pipeline transport, and coal mining industries.

8.4.1 Energy Trends

Trends in the Energy sector include the:

- continued oil and natural gas exploration and development
- commercialization of enhanced oil recovery technologies
- expansion of the oil and gas service sector

8.4.2 Energy Skill Shortages

The energy sector reports that skill shortages in this industry can be filled from within Saskatchewan or by recruiting labour from elsewhere in Canada. Occupations that cannot be filled within the province include electronics engineers, mechanical engineers, geological engineers, petroleum engineers, and safety and environmental technologists. The problem occurs in trying to draw this labour from the province of Alberta.

8.5 Tourism and Cultural Industries

The tourism sector is composed of those companies in the transportation, accommodation service, beverage manufacturing, and amusement and recreational services.

8.5.1 Tourism and Cultural Industries Trends

Trends in the tourism and cultural industry sector include the:

- development of Aboriginal tourism
- development of eco-tourism
- expanded paleo-tourism
- development of agri-tourism
- expanded production in various media, including film, video, sound recording and multi-media

8.5.2 Tourism and Cultural Industries Skill Shortages

All vacancies in this sector can be filled from within Saskatchewan.

8.6 Information Technology and Telecommunications

The Information Technology and Communications sector includes companies from Finance and Real Estate; Insurance; Printing, Publishing and Allied Industries; Communications; and Computer and Related Services.

8.6.1 Information Technology and Telecommunications Trends

Trends in the information technology and telecommunication industries include:

- new information technology servicing contracts with out-of-province firms, managed by Saskatchewan firms
- attraction of additional telephone call centres to the province
- provide business with access to high-speed data networks, such as the Internet
- continued growth of systems and hardware suppliers
- marketing of provincially developed information systems and expertise to other jurisdictions, particularly in the health care area

8.6.2 Information Technology and Telecommunications Skill Shortages

In general this sector felt that labour demands can be met from within Saskatchewan or in Canada. Although there is strong demand for programmers and analysts in Saskatchewan, respondents to the Skilled Worker Shortage Project felt that this demand could be filled within Saskatchewan. The only identified skill shortage was for the position of production manager of a large printing shop due to a high skill, engineering degree and experience requirement.

In addition to the six sectors identified by the Saskatchewan government, the Canada-Saskatchewan Strategic Initiatives-Labour Market Information Project added:

8.7 Construction Sector

The construction sector includes building, development and general contracting; industrial and heavy (engineering) construction; and trade contracting.

8.8 Business Services (excluding health and education)

The business services sector is the fastest growing sector. (Refer to Section 9.0 Business Overview for more details.)

8.9 Fabricated Metal Manufacturing Sector

The Fabricated Metal Manufacturing Sector includes the following industries: power boiler and heat exchanger; fabricated structural metal products; ornamental and architectural metal products industries; stamped, pressed and metal coated products industries; wire and wire products industries; hardware, tool and cutlery industries; heating equipment; machine shop; and other fabricated metal industries (e.g. windows and doors, and thermal forming or plastics).

8.9.1 Fabricated Metal Manufacturing Skill Shortages

Skill shortages were identified in the Machine shop industry. This shortage occurred for gear cutters and gear grinders.

Other skills shortages that employers were not able fill in Saskatchewan included:

- The steel fabrication industry. Steel detailers.
- The truck industry. Painting (automotive quality).
- The turbine casings industry. Welders/fabricators.

The Identification of Saskatchewan Skilled Worker Project prioritizes the identified skill shortages that cannot be met from within Saskatchewan, or through training, by six factors. These factors include the:

1. Impact of filling the job vacancies on the economy.
2. Number of vacancies available in the identified area.
3. Skills and training required, including experience.
4. Urgency of demand for the labour.
5. Duration of the demand.
6. The commitment to participate in hiring immigrants.

The results of the prioritization of skill shortages are shown in Table 14.

TABLE 14: PRIORITIZATION OF SASKATCHEWAN SKILL SHORTAGES

Priority Number	Sector	Industry	Occupation
1	Agri-value	Hog Production	Manager, Hog Production
2	Agri-value	Hog Production	Barn Manager
3	Agri-value	Agriculture and Industrial Chemicals; Agriculture Biotechnology	Biology Agronomists
4	Fabricated Metal Manufacturing	Machine Shops	Gear Cutters
5	Fabricated Metal Manufacturing	Machine Shops	Gear Grinders
6	Information Technology/Telecommunications	Printing, Publishing, and Allied Industries	Production Manager

(Source: Saskatchewan Economic and Cooperative Development, Saskatchewan Post-Secondary Education and Skills Training, Human Resources Development Canada, and the Saskatchewan Institute of Applied Science and Technology, Identification of Saskatchewan Skilled Worker Shortage Project, January 1999.)

9.0 Business Overview

It is a widely accepted belief that small business provides most of the jobs for the labour force.

TABLE 15: DISTRIBUTION OF BUSINESSES BY SIZE

Business establishments by number of employees mid 1997								
	British Columbia		Alberta		Saskatchewan		Manitoba	
Number of Employees	% of firms	% of jobs	% of firms	% of jobs	% of firms	% of jobs	% of firms	% of jobs
1-19	89	40	89	40	92	46	87	35
20-29	9	34	10	33	7	31	11	32
100-499	1	18	1	19	1	16	2	20
500+	-	8	-	8	-	7	-	13
Total	100	100	100	100	100	100	100	100
Related characteristics of labour force, 1996 Census								
Work at Home %	9		11		11		11	
No fixed work address %	11		10		7		7	

(Source: Statistics Canada and Saskatoon and District Chamber of Commerce, Business Climate.)

Saskatchewan has 92% of businesses with under 20 employees, creating 46% of the jobs in the province. The implications for this are that small business should be encouraged and assistance offered in order to make the most of this sector. Given these figures, the question arises: Are entrepreneurs avoiding Saskatchewan? Statistics Canada provides data for the period 1989 to 1997 that points to this disturbing fact.

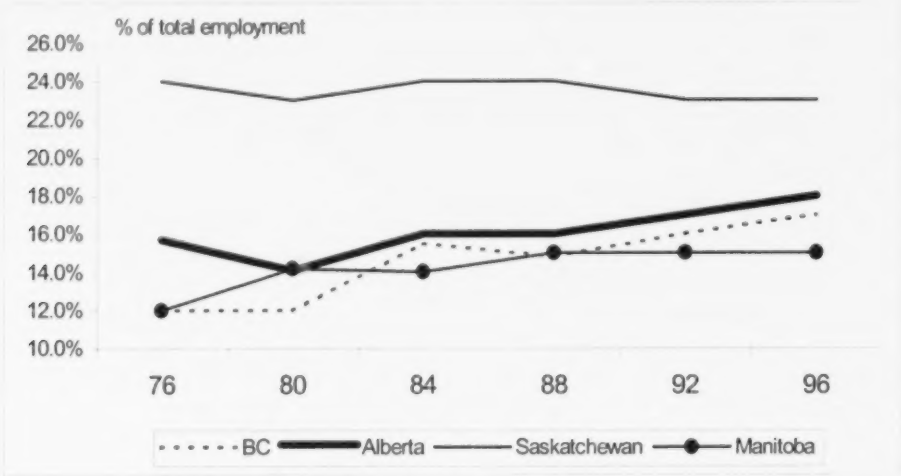
TABLE 16: ARE ENTREPRENEURS AVOIDING SASKATCHEWAN? 1989-1997

Province	Growth in New Business
Manitoba	+18%
Saskatchewan	+2%
Alberta	+46%

(Source: Statistics Canada and Saskatoon and District Chamber of Commerce, Business Climate.)

Although the growth in new business since 1989 is disappointing, self-employment is still the highest in Saskatchewan when compared to the other Prairie provinces and BC.

FIGURE 20: SELF-EMPLOYMENT AS A % OF TOTAL EMPLOYMENT.



(Source: Statistics Canada. Labour Force Survey).

The number of employers in Saskatchewan has shown a decrease of 417 in the period from 1992-1997. Table 17 illustrates how this compares to the other Prairie provinces.

TABLE 17: EMPLOYER BUSINESS GROWTH FOR THE PERIOD 1992 – 1997

Province	# of Employers
Manitoba	+1,229
Saskatchewan	-419
Alberta	+14,059

(Source: Statistics Canada and Saskatoon and District Chamber of Commerce, Business Climate.)

10.0 Employment Trends

This section deals with a number of trends that have an impact on future training requirements.

10.1 Hot Jobs

A new book from the American Vocational Association has identified '10 Hot Jobs'[9]. These 'hot jobs' are outlined in Table 18.

TABLE 18: TEN HOT JOBS

Job	Requirements	Salary US$
Physician Assistants	- Formal training at least 2 years long. - Admission requires at least 2 years college and some health care experience.	$61K
Drafters	- Post high school training in drafting.	$31K - $41K
Paralegals	- Certification is voluntary but most have some formal education.	$33K
Emergency Medical Technicians	- 110 to 120 hours of classroom plus 10 hour internship in hospital emergency room.	$25K to $30K
Construction Managers	- Solid background in building science, business and management. - More employers are wanting real-world experience and a related bachelor's degree.	$28K – 100K
Dental Hygienists	- Dental hygienist program. - Written and clinical exam.	$38K
Computer Programmers	- Two or four year degree.	$40K
Licensed Practical Nurses	- High School Diploma. - Approved LPN program. - Licensing exam.	$25K – 35K
Machinists and Tool Programmers	- High school education. - Associates degree in machine technology for advancement.	$28K - $60K
Dieticians and Nutritionists	- Could need a license or certificate to work. - University degree may be needed.	$20K - $30K

[9] Unknown, "Ten Hot Jobs", Techniques, Jan. 1999, p. 26.

10.2 Emerging Occupations

According to a report prepared by TCI Convergence Ltd. For Human Resources Development Canada[10], emerging occupations were identified in the following sectors:

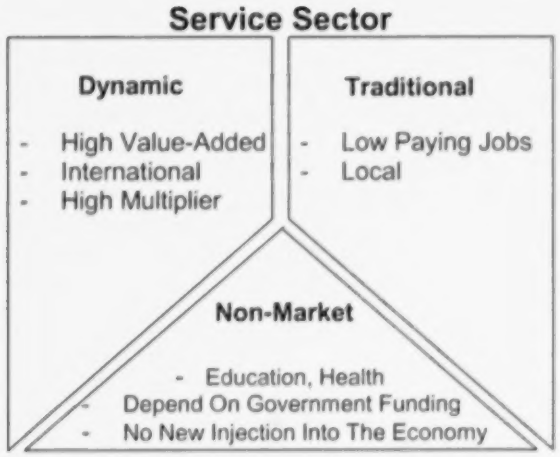
- Multimedia
- Internet
- Information Technology
- Telecommunications
- Advanced Network Technologies
- Robotics and Automation
- Environment
- Health Care (Adult care and privatized health care)
- Biotechnology
- Voluntary Sector
- Research and Development
- Gaming
- Call Centres
- Other Miscellaneous

Most new occupations were to be found in areas which are in some way related to technology and could be classified as "knowledge workers". Many of these technology related occupations are classified as emerging due to the rapidly changing nature of technology rather than strictly because of the emergence of a completely new occupation. There were also large concentrations of occupations in the robotics and automation fields as well as various technology research and development areas. Occupations related to telecommunications and computerization were particularly prominent.

It is widely recognized that there is a shift occurring from manufacturing to knowledge oriented jobs. Figure 21 provides an illustration of where the shift is occurring in the service sector. Also, from the list of emerging occupations above, we can see that most of the new emerging occupations in the knowledge sector would fall into the "Dynamic" Service Sector category. These types of occupations have a much higher multiplier effect on the economy compared to traditional service occupations or education and health service. It is beneficial to the economy as a whole to strengthen this "Dynamic" category of the service sector.

[10] *Source: TCI Convergence Ltd., HRDC: Review of Emerging Occupations and Sectors, Feb. 1998.*

FIGURE 21: SHIFT FROM MANUFACTURING TO KNOWLEDGE ORIENTED INFORMATION AGE



(Source: SIAST Planning, Research and Development Division, Labour Market Presentation, 1998)

10.3 Full Time Employment Returning

Statistics Canada figures indicate that the trend to full time employment is returning. Full time employment reached a high in Saskatchewan in 1977 at about 84% and a low in 1992 at about 77%. The latest figures indicate a full-time employment level of around 79%.[11]

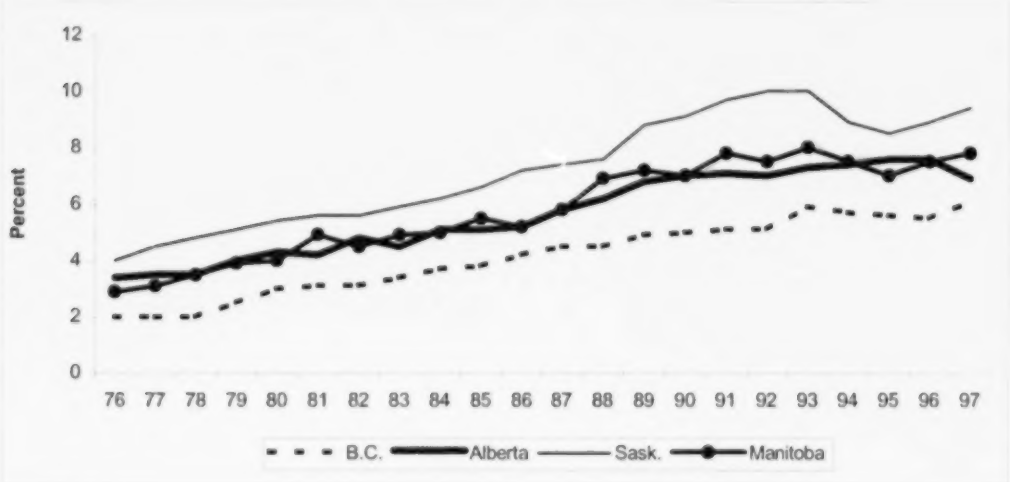
Compared to the other Western provinces, Saskatchewan has the lowest percent of full-time employment of the total employment in those provinces.

[11] Source: Statistics Canada, Labour Force Survey.

10.4 Multiple Job Holders

Holding a second job is very common. This causes increased stress, especially for young families.

FIGURE 22: MULTIPLE JOB HOLDERS (% OF TOTAL EMPLOYED WHO HOLD MORE THAN ONE JOB)



Source: Based on Statistics Canada, Labour Force Survey.

For more details regarding changing work patterns, refer to Report #98-02, "Report on Changing Work Patterns as we Approach the Year 2000", prepared by SIAST Research and Development, 1998.

10.5 Increased Importance of Internationalization

There is growing support for the idea that education of the future must be more internationally oriented. University rectors and presidents from all over Europe agreed with this view in a recent survey entitled "University 2010".[12] "Time spent studying abroad" was ranked 16th of 18 criteria for employing graduates a few years ago. Today, in many firms, the experience of living abroad is a precondition for promotion to the management ranks.

[12] *Source: Christian Bode, "Internationality is Tops: German Higher Education at a Time of Change", Deutschland, October 1998, p. 3.*

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